

MERIDIUS MATTERS

Innovation in the Spotlight — Intapp in Discussion



Pat Archbold

General Manager,
Collaboration & Content

“Everything Just Changed” —

Pat Archbold on supporting flexible work
with Intapp and Microsoft Teams



Setting the Stage

Pat, you've been at Intapp for sixteen years, and in legal technology for even longer. You have been in the room where many big things have happened.

In the early days of document management system adoption, you were there. As the DMS scaled and became matter-centric, you were there.

As enterprise IT architectures transitioned from on premises to cloud, you were there.

As client due diligence and acceptance, new business intake, and conflicts management moved from legacy paper and homegrown workflow tools, you were there.

And now you've taken on a new role, leading the Collaboration and Content practice at Intapp. That extended group of 100+ is focused on transforming how professional services firms work with Microsoft Teams.

Given your track record, and the industry's snowballing focus on Teams, this is clearly the next big thing.

Why is that when big shifts happen, Intapp is often playing a major role pushing that innovation?

What has driven you to always be in the right place at the right time?

Listening and thinking ahead. This is the best articulation of what an "industry cloud" is. Each industry will use Microsoft Teams differently. Teams is the best horizontally focused collaboration tool on the planet; it will change how knowledge workers execute. But for professional services firms, we need a more differentiated approach.

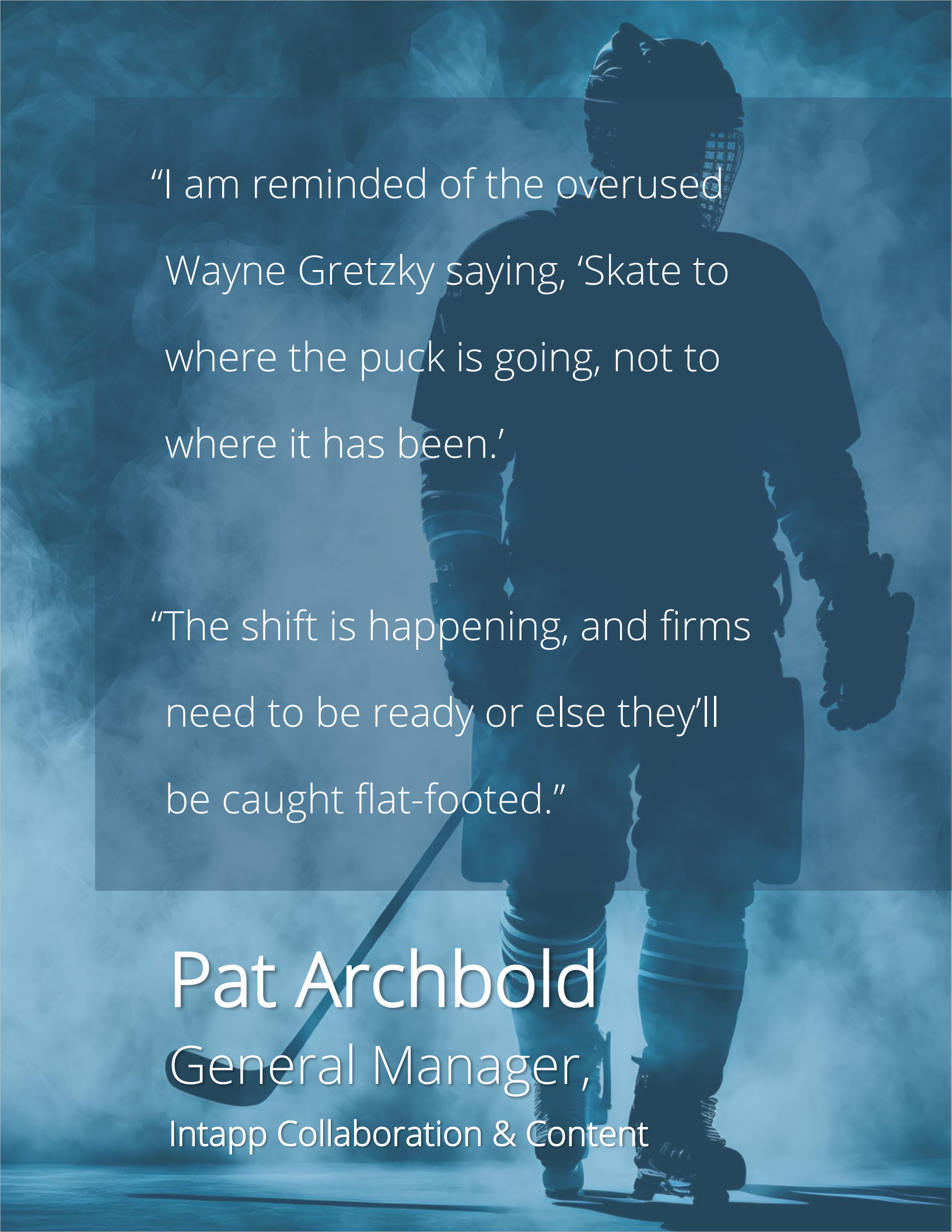
As an example, what General Counsel is going to allow widespread document collaboration without information barriers? Will an auditor use Teams the same way a salesperson uses Teams? We have a team of people that wake up every day thinking about how to tailor these innovative solutions for professional services firms.

I am reminded of the overused Wayne Gretzky saying, "Skate to where the puck is going, not to where it has been."

The puck is moving fast and firms had better start planning for change now. The moment I first saw ChatGPT, it hit me. Again. Everything just changed. Everything is going to change.

Think of the amount of knowledge produced on a daily basis, and the amount of money Microsoft is pouring into this area as well. If we can tailor this to the professional services market and leverage AI, we are skating to where the puck is going, to where content is going.

I'm old enough to remember when WordPerfect was what every law firm used. Then a new thing called Word came out. Clients started using it, and within 18 months, everything shifted for their firms.



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Microsoft Teams is similar. We saw a big ramp during the pandemic, then it simmered down a bit. But the fundamental drive to improve productivity is causing businesses to embrace it.

Some corporate clients are starting to invite their lawyers, accountants, and other external consultants onto their Teams workspaces.

The shift is happening, and firms need to be ready or else they'll be caught flat-footed.

Going back to the hockey analogy: You can't teach somebody to skate where the puck is going. They either get it, or they don't.

Intapp has always been at the forefront of change.

We have created markets where none existed. Fifteen years ago there was no such thing as a "confidentiality management platform" or automated time capture"; we are in a similar spot in time."

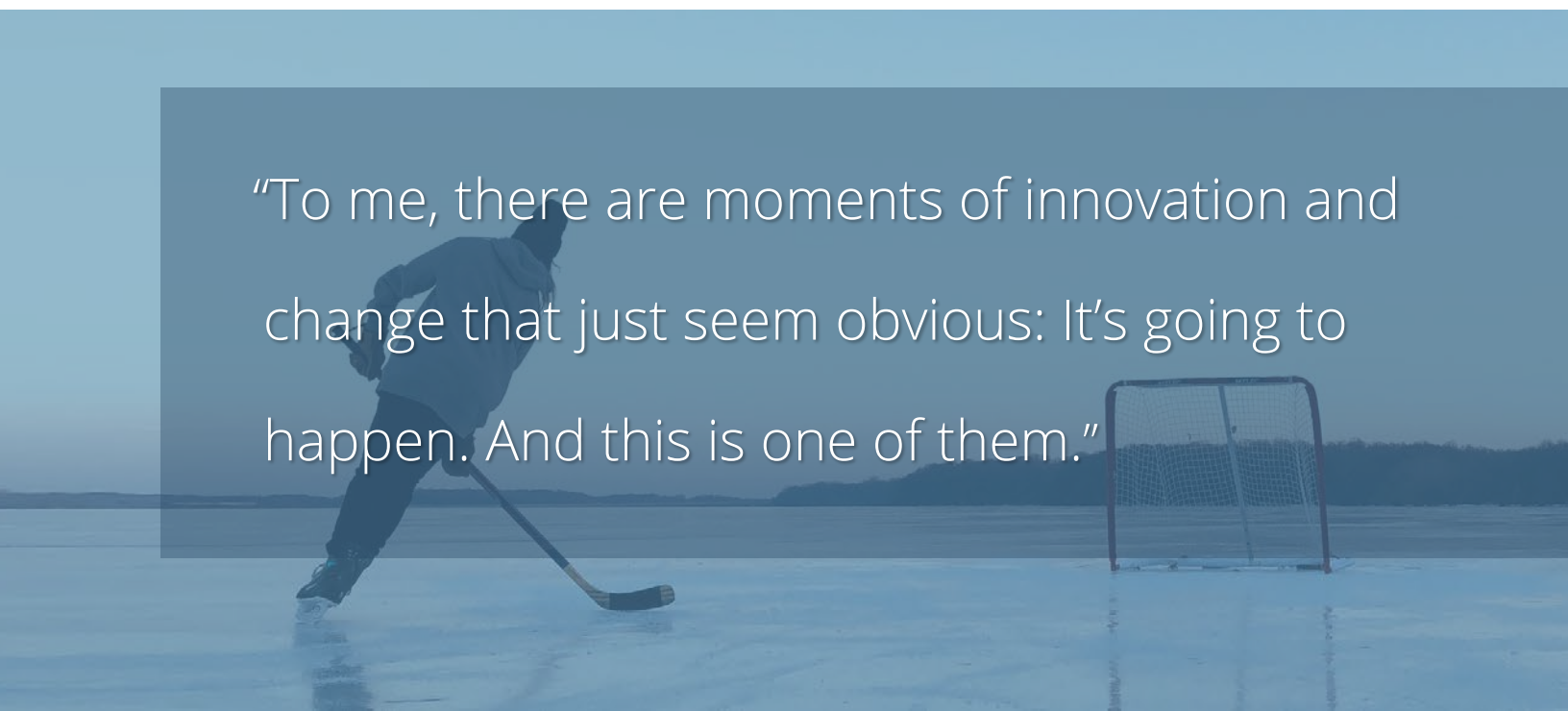
On a New Adventure

What are you actually doing right now in your new role at Intapp? While you are skating on this ice of innovation, how are you spending your time?

I spend a lot of time talking to the advisory boards, listening to clients, and meeting with Microsoft, to get a better understanding of where the puck is going.

At our recent accounting advisory board meeting, we had 25 of the top accounting firms presenting. They suggested the topics, and what they wanted to hear about was Intapp Collaboration & Content and what we are doing with Microsoft as their key industry partner.

Up in Redmond, at Microsoft, we gave an executive briefing to 18 of the top law firms in the world giving us feedback on issues that are top of mind for them.



"To me, there are moments of innovation and change that just seem obvious: It's going to happen. And this is one of them."

They also really wanted to discuss how they can get the most out of Teams. They're looking to the short and medium term, around adoption best practices, but also longer term at things like ChatGPT and Power BI integration.

So we've been spending a lot of time on the listening front. I spend time on making sure our organization is hearing those industry needs and being responsive. We recently set up a Modern Work Consortium — a roundtable, if you will, for firms to discuss innovation and collaboration.

By taking the time to listen, we're ensuring that our product teams are really thinking about the legal, accounting, and financial services industries and building out features based on the feedback from those firms.

The Talk of Teams

What else specifically are you hearing from law firms, accounting firms, and others on your advisory board that you can share with us?

Over the past decade, if you look at all the tools that have been thrown at professionals to make them more “efficient” — email, VoIP phones, Skype, Slack, Dropbox, HighQ — it's no wonder many firms have said, “I give up, I don't understand it. I don't know how to use it.”

What Microsoft has done with Teams is brilliant.

It's a great horizontal application. But again, it can be the same mess if you don't do it right. It's not focused on the needs of the professional services industry. If you just let people go wild and create

teams, you may have a little less chaos in the short term, but it's still chaotic, and people don't know where things are.

What Intapp provides is the ability for a practitioner to think: “Ok, I'm opening a new engagement. I have to go through an intake process to open the engagement. I have already told the system the type of engagement and who needs to work on it; create the Team for me and make sure my information barriers are respected. Don't make me re-enter data, don't make me think about it, just help me do my job better.”

It's a workflow with a logical progression. Intapp has already built that in to Teams and will continue to build additional capability as things evolve.

It's not like all the KM and AI tools that were hyped but ended up not producing much for professional services firms. Microsoft Teams, used with Intapp Collaboration & Content, will deliver, because it applies an industry-specific focus, which is in the DNA of Intapp.

What has you so excited about Microsoft Teams?

To be frank, now that Microsoft Teams is maturing, I would argue that the days of the legacy document management system are numbered.

I spent a decade working with document management systems, and not much has changed in 25 years — until now. Everyone has always complained about the limited co-authoring capability in legacy DMS systems. Microsoft is built from the ground up to do this and this is the way modern work will happen. Corporate clients see the potential and are diving in.

Some firms will be skeptical, and point to past attempts by Microsoft to get firms to embrace SharePoint as their DMS. Why would you invest large sums of money to move your data silo from on-premises to the cloud and have basically the same functionality?

Well, we are in a rapid time of change. As a business leader, you have a fiduciary responsibility to your partners to ensure their technology dollars are invested on the right long-term bets.

A couple of things have changed since the early days of SharePoint. The infrastructure has moved to the cloud, and integration and AI are changing everything — automating the tasks that were a barrier to adoption, but also enabling us to work more efficiently, in ways many of us had never imagined.

Using Microsoft Teams myself, I'm finding that preparing for meetings doesn't require as much hunting and gathering as it used to. Meeting suggestions are great — no more back and forth searching for a time that works for everyone.

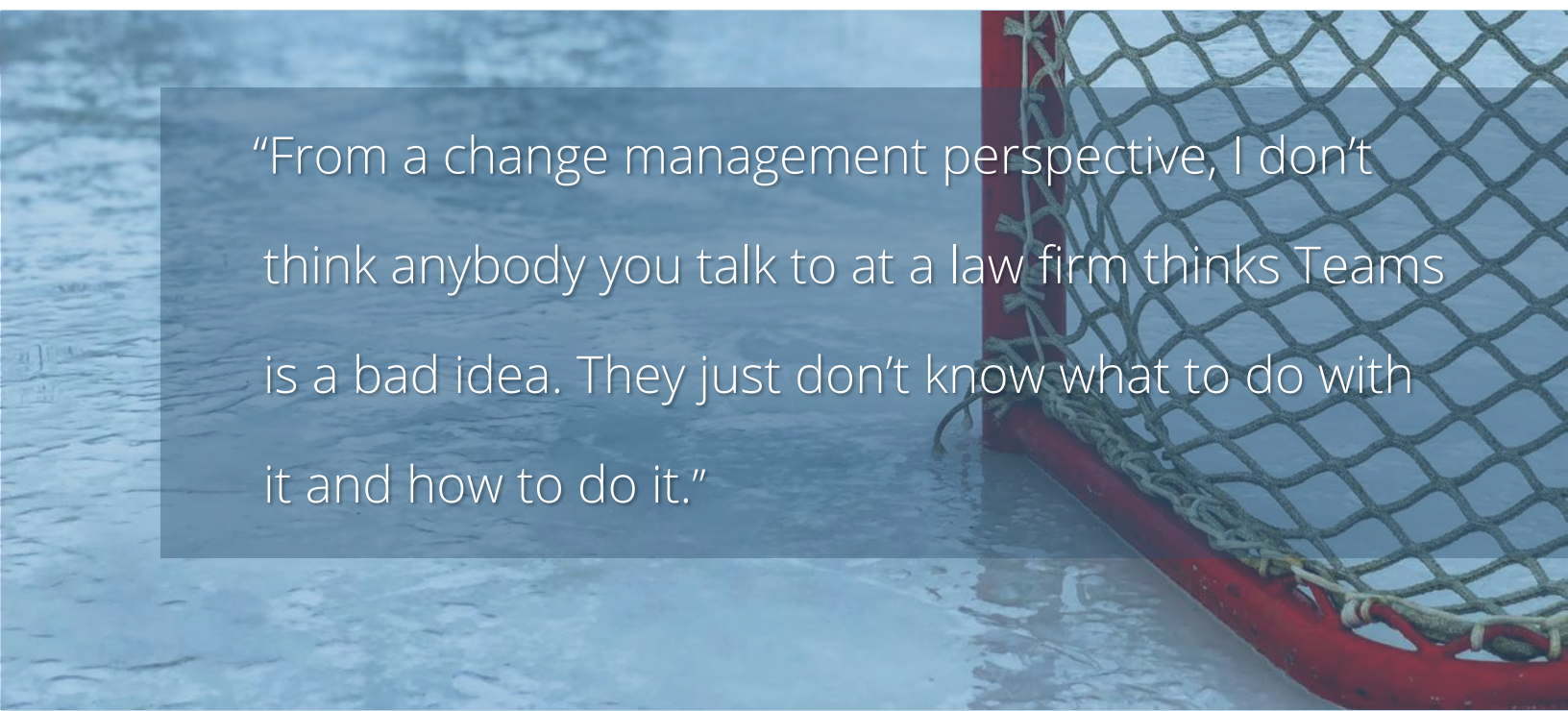
Which deck do I need? Teams points me to the deck my team has been working on, so I can jump right in with my input through co-authoring.

What else do I need to know? I see there are three PDFs in my inbox from Ben that I haven't reviewed yet, a major document that was shared in the group channel, and a priority email I had been waiting for from a Tier 1 client.

If you think about incorporating an AI tool like ChatGPT to help summarize meeting notes, it gets even more exciting. Think about it automatically pulling out action items at the end of the meeting.

So as you go from Teams meeting to Teams meeting — or Zoom for that matter — you don't have to worry about taking notes. And if you miss a meeting, you don't need the 32-page summary of someone else's notes you'll never have enough time to read.

Microsoft has pulled this all together through Teams, so you can leverage everything Microsoft 365 has to offer. It's a core technology.



"From a change management perspective, I don't think anybody you talk to at a law firm thinks Teams is a bad idea. They just don't know what to do with it and how to do it."

But what law firms and professional services firms need is more governance and structure around the information and content that they generate. Firms are required legally and ethically to protect client information by restricting who has access to it. Clients often have specific guidelines that firms have to comply with. And firms want to make sure they're implementing their own information governance and retention policies to minimize risk.

At the end of the day, firms can't leave information sitting here, there, everywhere, unmanaged. And the volume of content that law firms and legal departments in particular generate is unparalleled.

On Intapp Innovation

And that's where Intapp comes in.

Exactly. Once you have provisioned your Microsoft tools using Intapp Collaboration & Content, you'll have your content organized in an engagement-centric way.

So for example in a law firm, I see a document in the workspace and understand what type of matter it was, I understand who the client was on the other side. I've got it all tagged correctly now. It's not just a mess of data that systems can't make sense of.

As a professional services firm, you have to go through an intake process before you start working with a new client. You have to apply confidentiality rules. And you have to understand any outside counsel guidelines they have in place.

We've embedded that within the Teams solution to leverage the data you're putting in, so there's a structure that makes sense.

We've set up templates focused on industry-specific requirements for confidentiality, as well as templates for the Planner. If it's an M&A matter, for example, it will show you the 52 tasks that need to get done every time. If it's an IP matter, it will show you IP-specific tasks. Whatever it is, we have templates tailored to what firms need.

Firm Advice

What challenges do firms face when it comes to adoption?

From a change management perspective, I don't think anybody you talk to at a law firm thinks Teams is a bad idea. They just don't know what to do with it and how to do it.

That's why we're investing in those templates and investing in change management to really focus on industry-specific requirements.

The reality is, most professional services firms have some sort of a content management, document management, legacy document management system. The last thing they want is for Teams to become their shadow DMS and an unstructured mess of information out there.

So the ability to integrate and tie in to those in a very seamless way to support things like co-authoring and tagging in the native Microsoft 365 applications is a significant differentiator, because that is just harder to do in some of those legacy systems.

Again, thinking down the line, once you get all this content into this platform, now you can leverage things like ChatGPT and Microsoft Syntex, which further connect how AI integrates with their tools.

“...And now you can mix
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General Manager,
Intapp Collaboration & Content Solutions

The irony is that it's not like firms haven't invested or had some success accelerating the knowledge lifecycle. How many hundreds of millions have been spent on knowledge management in law firms and accounting firms?

But I would argue maybe people haven't realized the value of those investments, because it always was unrealistic to expect busy practitioners to keep a KM system up to date with everything they know.

Even if there were groups that used a KM tool successfully, it generally required too much overhead to scale that activity, and it makes sense that client-facing professionals prioritize responding to immediate client needs.

But now there's technology that can do 60 to 70 percent of that for you. So now it's that last mile where Intapp is focusing, to maximize the benefits of collaboration and tie everything together in a practical way that's tailored to specific industry practices and needs.

The advantage professional services firms have is that they have insanely good structure around their content, because they bill for every second. So they've solved a lot of the tracking and classification of work for billing purposes.

They've never been able to get their practitioners to actually do anything with it other than bill time.

But now the machine can actually read that and leverage all this stuff that you've done for years to categorize it properly. And now you can mix that together and boom — it's lightning in a bottle!

Intapp's Play

Can you talk about how Intapp is organizing and investing to deliver on this Teams, content, and collaboration vision?

Yes, our working operation model is a big asset and advantage of ours. In the very early days of the company, we took a lesson from professional services firms we service and adopted our own practice and industry group model. This was 15+ years ago and it is really paying off now in the world of industry cloud-focused offerings.

Key to that is assembling a team of smart people who are tasked with thinking not just about what software to build, but also about the actual context — about the problem it's trying to solve, about the customers we serve in context, and about larger industry, technology and even regulatory trends.

Today we have over 100 people working in the Intapp Collaboration & Content practice. Within the practice we have industry experts in Accounting, Legal, Private Capital Markets, Real Estate Investments, and Investment Banking.

This isn't some backend utility that helps an administrator. We are transforming how knowledge workers leverage Microsoft innovation and drive efficiency. This wouldn't have happened five years ago — it can be hard to drive change within a partnership — but the pandemic drove technology use and there's no turning back. They aren't coming back to the office six days a week, and flexible work is here to stay. How are you going to support it?

Our practice group model is based on the understanding that the “product” is about more than the buttons that do things. It is about the ecosystem, about the knowledge of how to use it, the knowledge of how to introduce it, the training and tutorials, the partner network.

The legal technology road is littered with vendors that may have delivered a hit product or two, but couldn't sustain innovation. They stopped listening to customers. They grew big, but couldn't see the horizon over their own ambitions, losing sight of what the industry actually needs.

There are also big conglomerates that are bolting some technologies together and making big promises, but aren't actually building an integrated, industry-focused platform. They're not actually thinking about it in that way.

At Intapp, we've had the practice group model in place for 16 years, since I started here. And today, we have 1,000-plus people company-wide who wake up and think about what professional services firms actually need. Their insights help to shape our product roadmap as we deliver a true industry cloud for our customers.


We are also investing in advising clients in change management — not just “here's a piece of kit” and “hope it all works.”

You can't just hit enter six times and all of a sudden, your lawyers are going to start using it. It takes somebody to actually come in and understand what you're trying to achieve, educate them, get them excited.

It sums up perfectly what we're experiencing with Teams. Firms get started and then realize they're not quite sure what to do, and don't have a plan. The tailoring and advisory role that we provide — I would argue, you can't be successful without it.

How many firms have adopted Intapp Collaboration & Content to date? What are the most important elements, for firms you have recently spoken to?

More than 200 organizations are using the Intapp Collaboration & Content suite, including Big 4 accounting firms, Fortune 500 law departments, and law firms, private equity, investment banks, and real estate investment firms.

A group of people are ice skating on a frozen body of water. The ice is a mix of white and blue, with some areas appearing more solid and others more cracked or thin. Several people are visible in the background, some standing and others in motion. The overall scene is a winter sports setting.

“More than 200 organizations are using the Intapp Collaboration & Content suite, including Big 4 accounting firms, Fortune 500 law departments, and law firms, private equity, investment banks, and real estate investment firms.”

Some of the largest accounting firms in the world are using our solutions to manage file reviews. Investment shops manage their deal documents. The use cases continue to grow; this is the future of knowledge working.

A law firm in the Southeastern US uses Intapp Workspaces for M&A engagements. The firm has the right people provisioned for the specific applications the M&A team needs to access. They have also set up Planners in Teams so the junior associates know, if it's this type of deal, it's these 15 steps.

The partner overseeing M&A was initially skeptical about Teams, but we explained how it works, and reassured him that Intapp was providing the guardrails for governance and to keep things organized. In a matter of minutes, he was creating teams himself.

More importantly, they can go to one spot and see what is going on across all 15 engagements, where tasks are overdue, who is doing what.

There's no need to check 52 emails and make a bunch of phone calls. You can go to one spot and quickly get a summary of what's going on.

Another big one we hear all the time is: "We have to get professionals to the point that they can use the modern work environment, and our legacy document management solution just doesn't make it easy."

They're just scratching the surface on co-authoring and those sorts of things. It's critical to modernize. Get it out of that old legacy system that doesn't support co-authoring and Microsoft 365.

Get it out, collaborate, use Teams capabilities and shared workspaces to collaborate on the documents — not just co-authoring, but going back and forth in an engagement-centric way. And when they are done, they check it back in to the legacy DMS.

Firms are realizing that the innovation is going to happen on top of native Microsoft Azure, not in a legacy document management silo.

We're offering CIOs a safe path to get to a modern work environment. So if you have people that are "stuck" in the old way of working, they can still do that. But you probably have a collection of people that want to work in the modern environment, and they can do that even better with Intapp plus Microsoft.

You don't have to get rid of anything; the new system lives in conjunction with the existing legacy system. When you're ready, if you want to get off the old system and go to the Microsoft-based tools, this is your path to do it.

Skating to Success

So this is how you're helping your customers skate to where the puck is heading for their firm in particular.

Yes, exactly. Firms working with Intapp can proceed on the journey to modern collaboration as fast or as slowly as they want, to the degree that they want.

What Intapp provides are the critical technology capabilities combined with the partnership and expertise to make it work.

We often refer to the “crawl to sprint” model. The governance is your “crawl”: Get Teams governed right, get it engagement-centric. Generally you are using Teams as your “purple Skype” for chat and phone calls.

Upleveling collaboration is your “walk”: Focus on the meetings or tasks you run on a regular basis that produce large volumes of emails like document sharing, and start to replace them — things like executive committee meetings, board presentations, deal pursuits, and industry group planning — and modernize those processes to drive efficiency.

Whatever it is, start to leverage the modern features of Teams through shared channels; implement better ways to track content, prepare decks, find the right email.

You can start with non-client data, and on HR and IT processes, before rolling it out more broadly to your practitioners. You’re building organizational muscle memory.

“Run” is where you start to focus on the practices and service lines that are highly collaborative or have tech-forward professionals. Think about M&A engagements or service lines around Cybersecurity or IP as potential starting points. Find your “visionaries” and start to build momentum.

The “sprint” is: Intapp Collaboration & Content and Teams are fully loaded. Use all the AI for the topic classification, note taking and task workflow, and incorporate Microsoft Syntex, ChatGPT, and all the advanced things that Microsoft can do.

It is going to take some time, but things are going to change. We can work with you to build a game plan that is tailored to your specific firm that drives adoption and demonstrates to your partners and clients that you are on top of this innovation in a measured but effective way.

You would not expect an 18-month-old to suddenly start sprinting up the stairs. Start slowly and deliberately, and by all means use Intapp's content connectors as your bridge to modern work.



“Starting to get a handle on Teams now will help you prepare you for working with clients in the ways they’re coming to expect.”

The other thing that resonates in my discussions with technology and industry veterans is the WordPerfect to Word example. This new Teams-driven model is how a lot of your clients increasingly want to work, so get ready.

You have to learn to crawl before you can walk, or you'll stumble trying to catch up. Starting to get a handle on Teams now will help you prepare you for working with clients in the ways they're coming to expect.

But you don't have to worry too much about that right now. Just start crawling and progress toward walking, and we'll help you run.

This is not something that is going to happen overnight. It will happen very organically. But there will be an inflection point where suddenly it all takes off, like other major technology shifts.

In many firms, your early adopters are already using Teams, and are already exploring and pushing the capabilities of the solution. Connecting with those leaders and incorporating their lessons, thoughts and feedback is always time well spent.

Final Thoughts

What other advice do you have for firms that are thinking about this journey?

What advice have you received from firms farther along the path that you would share with their peers coming along?

The simplest advice is, "Get started."

There are a lot of people sitting on the bench saying, "We don't really have a plan for how to roll it out." Well, get started, get the infrastructure, do it in a governed way, run a pilot, find your innovators.

It's just like Geoffrey Moore said in *Crossing the Chasm*. You can apply this model within your own firm: Find your visionary users internally, get them excited, and build momentum so you can get your pragmatists on board.



"The simplest advice is, 'Get started.'"

When it comes to technology adoption, the biggest challenge is bridging the gap between the early adopters, who are the visionaries, and the early majority of pragmatists. Moore defines this as the "chasm" and with the right plan, we can help you navigate it rapidly.

Starting with the operations team is often a good first move. You'll also find that certain practices naturally have more early adopters, like M&A, Cybersecurity, and IP.

Don't worry about getting every lawyer using this thing right away. Get it in, get it in in a structured way, but start using it within your IT team, in your HR team, the people who are a little more tech forward to start using it, and you will get a list of ideas from them on areas of the firm that will adopt this faster than others.

But it's important to start now and build familiarity with it, so that you're not caught flat-footed.

Because I do think there's no going backwards.

The genie is out of the bottle. The train is running down the tracks. Better get on board. I think I lost the hockey metaphor, but you get the idea.

And when you're ready to connect with Intapp, we're ready to support you. Just like we have in for the past two decades.

Pat, thanks for sharing your perspective today. Best of luck to you and the team.

Thanks Dan, always a pleasure to chat. 

About Meridius Matters

Meridius Matters is a publication of Meridius LLC. Led by technology and legal industry veteran Dan Bressler, Meridius consults with a diverse set of clients to enhance their strategy, messaging and marketing success.

Dan also publishes www.BresslerRiskBlog.com, highlighting the latest news in law firm risk, conflicts, and compliance news.



Dan Bressler